

15.10. Options (standard reasons)

You can create a list of options (or reasons) for the user to select from when they use perform certain actions in mSupply (in drop down lists etc.). Options are an alternative to the user typing free text, and can help standardise information being recorded in mSupply.

You can enter options for:

- **Requisition Line Variance:** Reasons for a variation between the suggested quantity and entered quantity in a requisition line.
- **Positive Inventory Adjustment:** Reasons for a positive adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question *why is there more stock than expected?*).
- **Negative Inventory Adjustment:** Reasons for a negative adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question *why is there less stock than expected?*).
- **New Cash Out Transaction:** Reasons for a cash out transaction.

Creating options

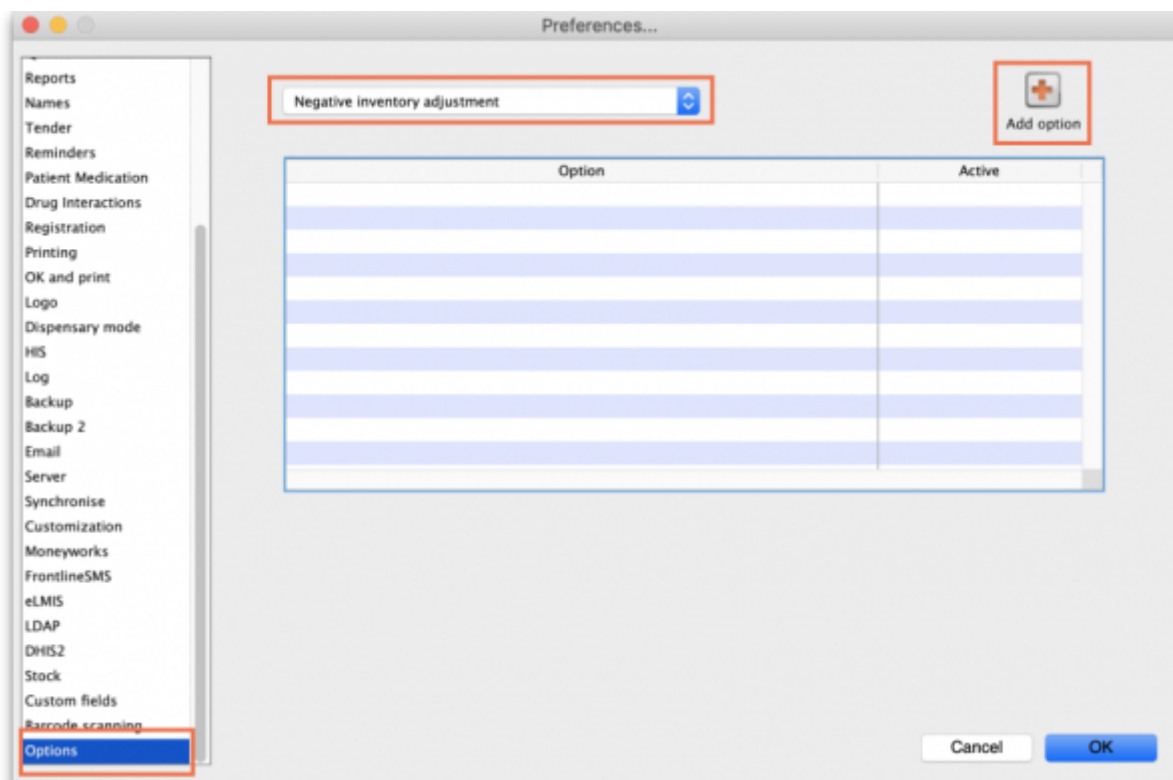


In a sync system, Options must be added on the **central server** and will then sync to other sites.

1. Go to the **Admin** tab on the Navigator and click the **Preferences** button:



2. Click on the *Options* tab in the list on the left hand side to see this page:



3. Select the transaction type requiring options from the dropdown list at the top. When you do that, the table will show all the existing options for that type.

4. Click the **Add Option** button and this window will open:

A screenshot of a dialog box titled 'Options' for the transaction type 'Negative inventory adjustment'. The 'Option' field contains the text 'Expired'. The 'Active' checkbox is checked. There are 'Cancel' and 'OK' buttons at the bottom right. Red boxes highlight the 'Option' field and the 'OK' button.

5. Enter a name for the option in the **Option** field, then click on the **OK** button to save it.



Once an option is saved, it *cannot* be deleted. Check carefully before pressing OK! If you need to prevent an option being available for selection by users then make it inactive. This will mean old options can be displayed correctly in historical records but they are no longer available for use by users.

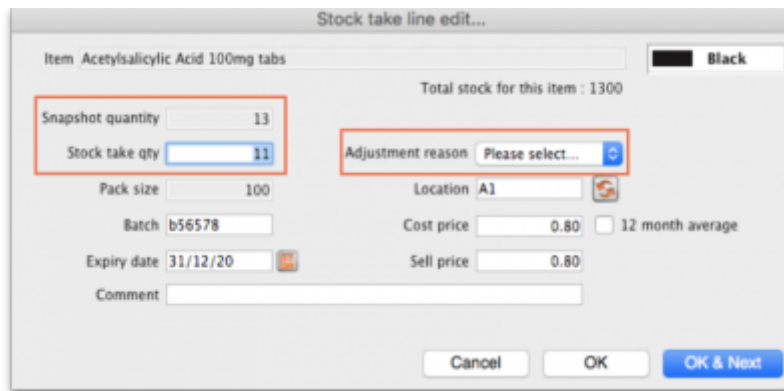
All options in use have the **Active** box ticked and will now appear for selection in the given transaction type.

If an option is no longer in use, find it in the list, double-click on it and uncheck the **Active** checkbox. This will remove it from the list of options available for a user to select.

This is what the list looks like with some active and some inactive options:

A screenshot of the 'Preferences...' dialog box. On the left is a sidebar with a list of categories: Reports, Names, Tender, Reminders, Patient Medication, Drug Interactions, Registration, Printing, OK and print, Logo, Dispensary mode, HIS, Log, Backup, Backup 2, Email, Server, Synchronise, Customization, Moneyworks, FrontlineSMS, eLMIS, LDAP, DHIS2, Stock, Custom fields, Barcode scanning, and Options (which is selected). The main area shows a table for 'Negative inventory adjustment' with columns 'Option' and 'Active'. The table contains three rows: 'Expired' (Active checked), 'Damaged' (Active checked), and 'Lost' (Active unchecked). A red box highlights the 'Active' column. There is an 'Add option' button with a plus icon in the top right. 'Cancel' and 'OK' buttons are at the bottom right.

Option	Active
Expired	<input checked="" type="checkbox"/>
Damaged	<input checked="" type="checkbox"/>
Lost	<input type="checkbox"/>



Stock take line edit...

Item Acetylsalicylic Acid 100mg tabs

Total stock for this item : 1300

Snapshot quantity 13

Stock take qty 11

Adjustment reason Please select...

Pack size 100

Location A1

Batch b56578

Cost price 0.80

12 month average

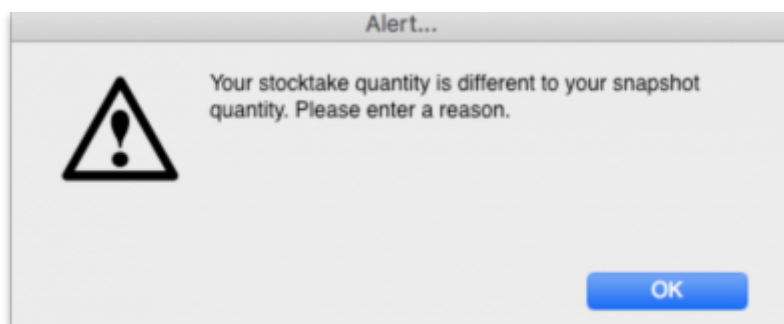
Expiry date 31/12/20

Sell price 0.80

Comment

Cancel OK OK & Next

If an adjustment reason is not selected, an error message will appear. You will not be able to proceed until an option is selected.



New cash out transaction

When creating a new **Cash Out** transaction:

A reason must be selected from the **Option** dropdown list.

Add cash transaction

Copy ID to Clipboard

Invoice Number 1

Entered by Admin

Entry date 18/07/19

Confirm date

Name
Alders Store
ALD

Transaction type
Cash out

Amount 10

Option
Refund

Description

New cash register balance: USD 0

Cancel OK

Payment type

When creating a **Prescription** in a dispensary where you receive payments:

An option must be selected from the **Payment Type** dropdown list when confirming the payment.

Prescription Entry

Patient details

Name: Patient, Test Date of birth: 23/11/1974 ☐ Female
 New Patient Code: Testp01 Address:
 Store: AKPESSEKRO (CSR-D PUBLIC)
 Entered: 04/06/2020
 Invoice: 431
 Entered by: Sussel

Prescriber:
 Confirm date: 04/06/2020
 Code: Prescription date: 04/06/2020

Items: Payment

Other details

This invoice will be automatically finalised if a payment is entered.

Cheque #
 Note
 To Pay

Invoice total 300.00
 Total to pay 300

Patient's credit status

Current balance	100.00
Credit limit	100.00
Available credit	100.00

Payment details

Amount paid by credit 50.00
 Amount paid by patient 250.00
 Total payment 250
 Amount given 0
 Change to give back

Select the payment type

☐ Finalise Export batch: 0 Status: on ☐ Print receipt OK & Next Delete OK

Previous: **16.09. Barcode scanning preferences** | | Next: **16.11. Custom fields**

From:

<https://docs.msupply.org.nz/> - mSupply documentation wiki

Permanent link:

<https://docs.msupply.org.nz/preferences:options?rev=1591953060>

Last update: **2020/06/12 09:11**

